



USING OUTCOME INFORMATION TO  
IMPROVE SERVICES TO CLIENTS

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## Executive Summary

The purpose of this paper is to discuss how outcomes measures can be used to improve the delivery of civil legal services. The Legal Aid and Defender Association (LAD)- Civil Law Group (CLG) uses several methods to determine outcomes. This paper reports on three of those methodologies, client surveys, participant surveys and statistical analysis.

Client satisfaction surveys can be used to improve the delivery system and provide feedback to boost employee morale. The paper demonstrates how anecdotal information from participant surveys can be used to save (United Way) funding. There is also a discussion of how survey comments are used to restructure the implementation of a community legal education workshop series. The final section focuses on statistics. The paper takes a look at various ways managers can analyze statistical data to determine whether the program is meeting goals and objectives, as well as whether changes in the delivery system have been effective.

In conclusion, the paper advances the supposition that to insure long-term survival, legal services programs must make measuring outcomes an essential part of their delivery system.

## USING OUTCOME INFORMATION TO IMPROVE SERVICES TO CLIENTS

The Legal Aid and Defender Association, Inc. (LAD) - Civil Law Group (CLG), uses several evaluation tools to measure the outcomes. Client and/or participant surveys, and case closing statistics are examples of methods used to determine the effectiveness of work. LAD first started using surveys in the mid-1970's. Beginning in the 1970's, the local Area Agency on Aging included a grant condition that required all grantees to provide seniors with an opportunity to rate their satisfaction with LAD services. Expanding on that procedure, the CLG implemented a procedure to send surveys to all clients (not just senior citizens) at the conclusion of their cases.

The organization also surveys community legal education program participants. The information is used to determine what kind(s) of presentations/topics would be of interest to eligible clients. This methodology has proven to be very effective in providing information regarding client services. The surveys assist LAD-CLG in developing presentations that meet the needs of participants. Additionally, analysis of case statistics assists managers in determining whether the organization is handling cases that fit within the program's priorities. The survey information also helps the staff to identify potential systemic issues.

### **Satisfaction Surveys**

Satisfaction surveys are a great method for collecting client opinions and identifying needs. The surveys allow LAD to quickly capture relevant information effectively and efficiently. For example, at the close of each case, every client is sent a survey (see Attachment 1). The client is asked to answer a few simple questions and return the survey in an enclosed, self-addressed business reply envelope. In 2003, clients completed and returned 13% of all surveys. Participants in the community legal education projects and workshops completed and returned approximately 95% of the surveys.

### **Practical Application of Satisfaction Surveys**

Returned surveys are given to management for review and analysis. LAD analyzes the surveys to determine client expectations and gauge how well the law group is at meeting client expectations. In general, analysis of the surveys indicate that clients expect to be treated with courtesy and respect; to have their story listened to; and to be told up-front whether LAD can assist them. Below are typical responses recorded from client satisfaction surveys:

“My lawyer understood my problem and was so good and kind.”

“Listen to the persons problem and let them go into detail.”

“I didn’t have any complaints, my attorney was very good keeping me informed.”

“Listen to complaints before dismissing the subject.”

“Letting the people know rather (sic) or not if they qualify for the program, as soon as they speak with someone that day.”

Assessing client satisfaction is critical to continued effective legal services delivery. However, an equally important component includes identifying client dissatisfaction. Client dissatisfaction information helps the organization identify potential lapses in service delivery. This information can then be used to identify and implement changes that result in better client services. The information can also serve as a learning tool for the staff.

For example, as a result of the client dissatisfaction information that was received, last summer LAD conducted training for all staff on interviewing clients. Additionally, LAD rearranged the order of the questions that were asked during eligibility screening. Specifically, one of the first questions now being asked is “what is your legal matter?” If it is something we do not handle; i.e., outside of the CLG’s priorities, the client is referred to the appropriate resource for assistance. This simple change reduced wait times for walk-ins as well as telephone callers.

The information obtained from the satisfaction surveys can also be used as morale boosters. Positive feedback helps develop staff job satisfaction and commitment to the organization. The value of staff feeling good about themselves goes beyond commitment to LAD as an organization; it directly impacts future customer satisfaction. Staff does a better job all around when they feel appreciated by the organization and the clients. Accordingly, management makes sure that staff receives copies of the positive feedback received from clients. Comments such as the ones below go along way in making the employee feel that they have been of value to the clients and are appreciated for their hard work:

“(Very satisfied) I can’t begin to thank you enough for being there for me in a time of need.”

“LAD have (sic) taken away any fear of people be able to run over or use me, my family, friends. We know someone is in our corner! Thank you.”

Providing individual staff with this positive feedback helps to motivate good employees, which in turn, results in less staff turnover and cuts down on both the economic and non-economic expenses incurred in having to recruit and train new employees.

### **Saving Funding**

Statisticians assert that a satisfied person will tell five other people about their good treatment and a dissatisfied person will tell nine others about their negative experience. LAD experienced this phenomenon when the United Way-funded Community Legal Education Series (CLES) program was in jeopardy of being defunded. CLES is a nine-week interactive project that staff developed to educate teens aging out of the foster care system. The project educated participants on how to handle day-to-day legal transactions in a responsible fashion. Participants who complete the program leave with a set of skills that can be used when conducting transactions such as how to rent an apartment, how to handle credit responsibly, employment rights and responsibilities, etc. Most of the participants in the CLES program are wards of the state and have no parent or responsible adult to assist them with these life challenges.

The CLES program is done in partnership with various social service agencies in the community that operate transitional living programs. Staff of the various transitional living programs love this program. LAD originally worked with two agencies at the onset of the CLES program. These two agencies shared their experience with others in the transitional living network. And not surprisingly, LAD received numerous requests from other such programs to add their agency to the rotation of agencies receiving the CLES training.

The participants are surveyed to determine what they learned from the program. The answers to these surveys are very helpful. The data is used to determine whether goals and objections for that particular module have been met. Below are some typical survey responses (see Attachment 2) from the participants.

“Must read contract and understand it before you sign.”

“When I rent a place, I will make sure everything works and that everything is fixed before I move in.”

“When I get a job, I’ll know what questions to answer and what not to answer.”

LAD over the years has maintained excellent relationships with the staff of the transitional living programs. This relationship became more critical to the survival of this program when United Way was contemplating reducing the funding for the CLES program. LAD was able to convince United Way to maintain funding using the information gathered from outcome measures. It was demonstrated that the CLES program had met the goals and objectives of the program as indicated in the funding application. LAD used letters of support from partner agencies to substantiate the accomplishments of the program. The letters of support expressed how participants learned skills that they can use as they transition into adulthood. LAD shared the anecdotal feedback gathered from the participant surveys with the funding committee.

Consequently, funding for the CLES program was maintained at the same level as in previous years.

### **Client Input**

Providers of legal services oftentimes forget that staff does not have all the answers to client problems, needs, or issues. LAD's experience with a project, Project Dignity, best illustrates this shortsightedness. Project Dignity is a project for single formerly homeless men who want to reintegrate into mainstream society. A local social service agency asked LAD to conduct legal education workshops for project participants. LAD staff put together a series of workshops for participants that were assumed would be beneficial to the participants. Topics included public benefits, housing, consumer issues, driver's license restoration, etc.

After several months of presentations, the staff decided to survey the participants to determine what topics were of interest to the participants. Much to the surprise of the staff, family law and housing turned out to be the topics that participants were most interested in learning about. Family law was of interest to them because many of the participants had families who were displaced during their period of homelessness. Many of these participants had outstanding warrants for back child support, wanted to modify custody and visitation agreements, and in general needed to reestablish contact with their families. In the housing area, it turned out that participants were not interested in landlord tenant law, instead participants were interested in owning their own homes and wanted to know about the nuisance abatement act and other home ownership programs.

Using the information learned from the surveys, the staff immediately modified the content of their presentations to emphasize the topics of interest to participants. Additionally, the staff offered assistance to participants in modifying custody, visitation and child payment orders. With the help of the LAD staff, the men were able to contact the Friend of the Court and clear up outstanding warrants, which cleared the way for them to develop relationships with their families.

### **Use of Statistics As An Outcome Measure**

Analyzing program statistical data can provide valuable information. Statistics assist in identifying issues that affect the community at large that could be pursued. Statistics can assist in determining whether or not the services being provided in priority areas can also be used to help a program develop standards and goals to meet the priorities. Statistics can be useful in the evaluation of the program. Statistics can be analyzed to determine whether the changes made in a program had the desired impact on clients and services. Managers should use the results of statistical analysis to decide how to allocate resources such as technology and staff.

LAD has managers look at statistics to determine whether the program is handling cases within the priorities. For example, using statistics it was learned that it was necessary to limit family law intake. Had that action not been taken LAD would have been inundated with family law matters. Consequently, the program would have been unable to focus on other areas of the law (and need). LAD's goal is to keep family law work at or below 35% of our overall caseload. Consequently, managers monitor statistics in this area and make adjustments as needed.

Prior to making this adjustment, the number of clients with all other issues, e.g., housing, public benefits and consumer issues just weren't getting through the intake process due to the overwhelming number of applicants seeking assistance with family law matters. Currently, case statistics indicate that family law represents 26.5% of all closed cases for 2003, which is under the maximum percentage of 35% of overall closed cases and thus within the range of acceptability.

Statistics are also used to determine staffing; e.g. the volume of cases handled by the office and number of staff in the office. Accordingly, the intake unit closed 57% of all cases in 2003 and consequently is the highest staffed office. Additionally, there is a very high demand for service in one of the outlying counties. Accordingly, based on data gleaned from the offices caseload statistics management made a decision that the Private Attorney Involvement Office would step up pro bono recruitment in order to increase our case handling capacity in this county.

Intake staff has often looked at statistics regarding certain bad actors in the community and because of the number of cases have been able to identify systemic issues that affect the community.

### **Conclusion**

Using outcomes can be very beneficial when it comes to improving client services. Measuring outcomes is essential to the long-term survival of any legal services program. Accordingly, legal services programs must get in the habit of developing tools or methods to enable the program to assess client and community satisfaction as well as program impact and make the use of these tools/methods an integral part of the program. The use of outcome measures in addition to determining client satisfaction/dissatisfaction will also assist a program to determine whether they are meeting other program objectives such as:

- Handling cases in priority area
- Identifying systemic issues
- Staffing offices with the right personnel to handle the volume of work
- Determining whether the content of community legal education presentations are useful and helpful to participants

- Determining whether the content of the presentation is of interest to the participants
- Garnering the support of other agencies in times of crisis such as a threat in loss of funding.

Outcomes also assist programs to meet other objectives such as, understanding client expectations, how well the program is meeting these expectations and what type of services need to be developed to meet the expectations of client and the community.

## ATTACHMENT 1

## **CLIENT SATISFACTION SURVEY**

\_\_\_\_ Please take the time to help us provide better services to you by completing this survey and mailing it in the enclosed envelope to the Legal Aid & Defender Association, Inc., Civil Law Group. We appreciate your assistance.

1. Name (optional):
2. Today's date:
3. Type of legal problem:
4. Was there a Court proceeding? (Circle one):  

YesNo
5. Circle the words which best describe your satisfaction with the legal services provided:  

Very SatisfiedSatisfiedUnsatisfied
6. Was the staff attorney courteous?
7. Would you use our services again?
8. Would you refer a relative or friend to us?

Suggestions for improving our services:

## ATTACHMENT 2



CLES  
Participant Evaluation Form

Name: (Optional) \_\_\_\_\_

What did you learn from tonight's class?: \_\_\_\_\_

\_\_\_\_\_

What did you like best about tonight's class?: \_\_\_\_\_

\_\_\_\_\_

What did you like least about tonight's class?: \_\_\_\_\_

\_\_\_\_\_

How will the skills that you learned tonight be applied to your daily life?: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Joan Glanton Howard  
Legal Aid and Defender Association, Inc.

### Outcome Measure Recommendation

My recommendation would be to have programs track and report on any and all work they do which results in a financial benefit to clients. By tracking SSI and other cases that result in the enhancement of income e.g., child support payments, legal services programs can demonstrate how their work boosts the local economy. Conservative estimates indicate that each dollar circulates 5-7 times through the local economy. Therefore, if monetary awards received by clients are tracked and reported in a systematic fashion, programs will have quantifiable proof as to the positive financial and economic benefits their work has had on the communities where they provide services.